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SOUTHERN HEMISPHERE CITRUS PRODUCTION AND EXPORTS NEAR LAST SEASON'S RECORD HIGHS 1-67

The 1977/78 season citrus production of leading Southern Hemisphere producing countries is expected to be down less than 1 percent from last season's. The slight decline is the result of smaller production in Sao Paulo State, Brazil, where heavy rains hit orange and tangerine groves during flowering and fruit set.

Only South Africa and Brazil of the Southern Hemisphere producers are prominent citrus exporters. South Africa, the world's largest exporter of oranges during the Northern Hemisphere summer period, expects record overseas shipments in 1977. Brazil, a small exporter of fresh citrus—but the world's foremost exporter of frozen concentrated orange juice—is expected to export about 200,000 tons of concentrate, 5 percent less than last season's record high.

The Southern Hemisphere accounts for an estimated 23 percent of total annual world citrus production. Nearly all Southern Hemisphere production is between April and January. This circular covers the citrus situation in Brazil, Argentina, South Africa, and Australia, which represent 85 percent of the Hemisphere's output, and Chile, a relatively small producer. We have insufficient information to review other Southern Hemisphere producing countries.

Argentina

PRODUCTION: An early-season forecast by the Secretariat of Agriculture pegged this year's citrus crop at 1.5 million tons, up 6 percent from last season's. Official planting and acreage estimates are not available; however, information provided by the Argentine Fruit Growers Association over the past few years indicates the following

planting levels: 150,000 trees in 1976, no estimate for 1975, 300,000 in 1974, and 500,000 in 1973 and for several years prior to 1973. One South African survey, now 5 years old, estimated that Argentina had 20 million citrus trees covering about 126,700 hectares in 1970. In the recent past citrus plantings have been stimulated by a Government program providing credits of 50 percent of the cost of new plantings, renewals, and cultivation of trees 2 to 4 years old.

MARKETING: Most of Argentina's citrus is consumed domestically; an unfavorable export exchange rate system and distance from markets have hindered exports. In 1974, the last year for which crop utilization figures are available, about two-thirds of the lemons, 85 percent of the oranges, 96 percent of the tangerines, and 20 percent of the grapefruit were consumed fresh in Argentina. The processing industry accounted for most of the remainder. Much of the grapefruit is processed for a popular soft drink.

Trade sources believe exports could be up as much as 10 percent in 1977 since the proceeds of citrus exports are now permitted to be exchanged at the more favorable free-market rate, and the 5 percent export tax has been dropped. The rebound in citrus exports in 1976 was related to the Government decision to permit exporters to convert 75 percent of export earnings at the free-market rate. Poland is the major destination for lemons while the European Community is the most important grapefruit market.

Available statistics indicate that the processing industry will produce about 30,000 tons of concentrated juice, 20 percent above the estimated 1976 level. Citrus juice exports in 1976 were reported to be more than double the 4,500 tons shipped in 1975 and are expected to register another increase in 1977.

Australia

PRODUCTION: A 440,000-tons citrus crop is forecast for the current season, 4 percent larger than last season's. Field reports indicate that the orange crop will be

moderately higher, mostly because of greater valencia output. Valencias received good rains in June and should size well with production totaling 220,000 tons, a gain of 9 percent. The estimated navel production of 128,000 tons is 2 percent above last season's, but fruit sizes are the smallest since 1963 because of continued dry conditions in the southern half of Australia.

Tree removals are believed to be mainly responsible for reduced tangerine production; while both tree removals near urban areas and dry conditions will probably cause the lemon crop to be down. Grapefruit production should be a record high.

Heavy plantings of lemons and grapefruit in the early 1970's could contribute a surplus supply of these fruits for some time to come. However, there is some concern that the decline in orange tree numbers and reduced plantings since the early 1970's will result in shortages, particularly for processing. Although production increases are probable for the near future because of improved management practices and higher yields from the orange plantings of the 1960's, the demand for orange juice has outstripped domestic fresh production since 1973. The following table shows the recent trend in citrus-bearing trees.

MARKETING: The domestic market has consumed an estimated 96 percent of citrus production in recent years with a substantial rise in processing use a major feature since the early 1970's. About 45 percent of the crop was processed the last two seasons compared with about a quarter of production in the late 1960's and early 1970's. Processors may take nearly half of domestic production during the current season. The swing to processed products is credited to higher consumer incomes, emphasis on health foods, and the rising costs of packing and marketing fresh fruit.

Until July 1976, increasingly larger volumes of orange concentrate were being imported (at lower prices than were being paid for domestically processed juice) to meet the unexpected growth in consumer demand. Imports had risen from 2 million liters (single-strength basis) in 1973 to 18.4 million liters in 1974, 28.2 million litres in 1975, and 26.3 million litres in 1976. Faced with high domestic production costs (reportedly 50 percent higher than Florida's) citrus growers prevailed upon the Government to provide

protection from orange juice imports. In July 1976 the Government established a 1 year tariff quota, which in July 1977 was replaced by a 65 percent ad valorem tariff rate effective for 1 year. It is anticipated that imports of orange juice concentrate will drop to about 15 or 20 million liters (single-strength basis) in 1977 because of the new tariff.

The rapid expansion of juice processing has led processors to expand production facilities for essential oils with the result that only small quantities of specialty oils may need to be imported.

BRAZIL

PRODUCTION: Slightly lower citrus production is forecast this season in Brazil because of heavy rains which reduced fruit set in Sao Paulo State last October and November. National production is estimated at 5.8 million tons of oranges, 735,000 tons of tangerines, and 630,000 tons of lemons and limes. Sao Paulo State, which accounts for virtually all of the country's citrus processing and citrus exports, is expected to produce two-thirds of the national citrus total. The remaining production is scattered over about 20 States.

Sao Paulo's orange crop is placed at 3.88 million tons, 4 percent less than last season's. Slightly smaller tangerine and lemon and lime production is also anticipated. An estimated 92 percent of the State's orange crop will be commercial.

Sao Paulo groves are expected to yield about 1.65 boxes (90 pounds each) of oranges per tree based on an estimated 57.7 million orange trees in bearing during the current season, including 10 million trees that will be reaching bearing stage. Large numbers of uprootings are reported to be continuing. Comparisons with tree fruit yields of previous years must await revisions now being made in tree numbers. However, tree yields have been boosted in recent years by improved plantings and cultural practices, particularly in the larger groves.

The season's average 65° Brix concentrated-orange juice yield is estimated at .65 gallons per 90 pound box (equivalent to 1.03 gallons of 45° Brix), about the same at last season's. Normal juice yields are reportedly between .71

Australia: Citrus Bearing Trees, 1970/71-74/75

(In thousands of trees)

Items	1970/71	1971/72	1972/73	1973/74	1974/75
Oranges					
Navels	1,811	1,824	1,765	1,680	1,681
Valencias	2,754	2,756	2,679	2,609	2,588
Other	111	96	93	85	99
Total Oranges	4,677	4,676	4,537	4,374	4,368
Lemons & Limes	433	444	473	467	507
Mandarins	516	527	506	491	487
Grapefruit	155	160	179	190	209

and .80 gallons of 65° Brix juice per box. (Caution: These juice yield estimates assume that all fruit purchased for processing is processed).

Growers have negotiated to supply this season's processing orange crop at 28 cruzeiros (approximately US\$2.05 at the June 1977 exchange rate) per box on-tree compared with an average of 11.75 cruzeiros (US\$1.14 at the June 1976 exchange rate) last season. Pick and haul costs are estimated at 5 to 6 cruzeiros. The gain in grower prices results from stronger international prices for orange concentrate that occurred late last season, particularly after the Florida freeze in January 1977. The Government's decision to maintain relatively high export tax credits for orange concentrate, despite the prevailing higher export prices this season, supported grower negotiations.

Sao Paulo State: Season Average On-Tree Prices For Processed Oranges, 1970-77

Crop	Cruzeiros/box (90 lb)	Approximate US\$ equivalent
1970	3.88	0.87
1971	6.12	1.18
1972	8.00	1.36
1973	11.50	1.90
1974	7.50	1.13
1975	7.80	.98
1976	11.75	1.14
1977 est.	28.00	2.05

Qualified producers can obtain 12-year Government loans for production expansion at 15 percent annual interest (less than half the normal commercial rate in Brazil) with the first payment not due until the fifth year.

MARKETING: In Sao Paulo, processors are expected to utilize two-thirds (2.65 million tons) of the State's orange production in 1977/78. An estimated 31,000 tons of Sao Paulo's fresh orange production will be exported and the remaining 1.2 million tons consumed fresh in Sao Paulo or shipped to other States. Nearly all of the orange production in other States is consumed fresh; although it is probable that some oranges, particularly from Minas Gerais, are being processed in Sao Paulo.

The orange juice processing industry underwent considerable change in ownership in 1976. A holding company formed by two of the largest processors purchased four other processors and now controls an estimated 75 to 80 percent of the State's processing capacity. Of the State's two other orange juice processing companies, one is managed with Sao Paulo State Government participation.

Sao Paulo's processors are forecast to produce at last year's levels of 210,000 tons of orange concentrate (mostly 65° Brix) and 250,000 to 260,000 tons of dried citrus pulp. About 95 percent of the juice production and all but a few thousand tons of the pulp produced in a given year are exported. In calendar 1977 orange juice concentrate exports are forecast at 200,000 tons; last year's record high level was nearly 210,000 tons.

Recent Brazilian price quotations reflect the world demand and supply of orange concentrate. F.o.b. Santos export prices for 65° Brix orange concentrate were reported to be ranging from \$800 to \$900 per ton in mid-May 1977. Another report indicated that early season juice was quoted at \$950 Santos destined for West Germany.

More recent indications are that prices now range from \$1,000 to \$1,125 per ton. In comparison the average export price to all destinations was \$481 per ton in calendar year 1976, \$454 per ton in 1975 and \$545 per ton in 1974. West Germany, the Netherlands, Canada, the United States, Sweden, and Israel have been the leading destinations in recent years.

Orange juice concentrate exports are exempt from both the 10-percent Sao Paulo State value-added tax (ICM) and the 10-percent National Industrialized Product Tax (IPI). In addition the State and National Governments each offers a tax credit equal to the exempted amount, which may be used to offset any respective ICM or IPI obligation from any transaction, including domestic, of the exporting company. Prior to May 15, 1977, these tax credits were 15 percent IPI and 13 percent ICM. Tax credits available to exporters of other citrus items include 8 percent each for IPI and ICM for fresh oranges and 10 percent each for dried pulp.

Chile

PRODUCTION: Chile's citrus production is forecast at a record high 94,600 tons, 8 percent larger than last season's good crop. Production gains the last two seasons are mainly the result of increased plantings, which have been expanding the total area by an average of 4.5 percent annually. New plantings are most noticeable in parts of O'Higgins and Colchagua Provinces in Central Chile.

The Ministry of Agriculture Planning Office (ODEPA) and the National Development Corporation (CORFO) estimate citrus area for the next 3 years as follows:

Chile: Projected Total Citrus Area, 1977-79

(In hectares)			
Items	1977	1978	1979
Oranges	4,495	4,690	4,865
Lemons	5,120	5,364	5,550
Total	9,615	10,054	10,415

On the basis of last season's estimated lemon yield of 12 tons per hectare (176 boxes of 76 lb each per acre) Chile's probable 1976 bearing area was 3,700 hectares. Non-bearing lemon area is estimated at 1,200 hectares for 1976.

MARKETING: Domestic consumption of citrus fruit during 1976 was estimated at 83,750 tons, about the same as in 1975. Lemon exports, mostly to Northern Europe, rose to 5,000 tons in 1976 at an average \$187.50 per ton f.o.b. No orange exports have been reported in recent years.

The latest available customs information shows imports of 3,900 tons of oranges and 190 tons of lemons in 1974. Imports were from Argentina, Bolivia, and Peru. All imported citrus is for the northern part of Chile and is controlled by quotas fixed by the Government every 6 months. The 1975 quota totaled 5,000 tons; for the first 6 months of 1976 the quota was 1,000 tons.

Processing has accounted for only about 3,000 tons of production, but a new processing plant, opened in 1976, could double intake. The new plant located in Puemo, O'Higgins Province, processed 400 tons of oranges last season, but has a capacity of 5,500 tons of citrus fruit. The plant also expects to process apples.

South Africa

PRODUCTION: The pre-season citrus production forecast for the year beginning April 1, 1977 was 640,000 tons, 4,000 tons less than last season. Fruit sizes are expected to be generally smaller because of drought.

South Africa's citrus production figures are based on the sum of exports and local pools administered by the South African Citrus Board. Orange production figures have changed little over the past 10 years although tree numbers have declined. Grapefruit production, which has fallen under the peak levels reached in the early 1970's, is expected to increase in the future because of greater tree plantings. Marketing difficulties are foreseen should these greater plantings continue. Lemon production and plantings have risen over the past decade.

MARKETING: The Citrus Board regulates and controls exports and local market supplies to obtain maximum returns for farmers. The Board also promotes citrus in domestic and export markets with funds from levies on fruit sold.

Republic of South Africa: Citrus Tree Census¹, 1967, 1974, 1975

(In thousands of trees)

Items	1967	1974	1975
Oranges	8,823	7,703	7,562
Grapefruit	956	1,129	1,235
Lemons	293	421	498
Total	10,072	9,253	9,295

¹ Data may include both bearing and nonbearing trees. Both 1974 and 1975 data include Swaziland and Mozambique; 1967 data believed to include Swaziland and Mozambique.

SOURCE: Citrus Board of RSA.

In 1977/78, export-grade citrus fruit production is estimated at a record high 405,000 tons. During the three previous seasons, citrus marketed through the Board's export pools ranged from 51 to 63 percent of production.

Europe and the United Kingdom normally take about three-fourths of total citrus exports. Leading destinations are the United Kingdom, France, West Germany, and the Netherlands. The Middle East has become an excellent outlet for fresh oranges. The Citrus Board has been active in this area and expects sales to increase.

During the past three seasons the share of the citrus crop processed has ranged from 15 percent to 35 percent, depending on the competitive situation in export markets. In 1975, for example, heavy Brazilian supplies of orange juice concentrate forced South Africa's processors to halve the volume of oranges processed.

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FRESH SWEET ORANGES: PRODUCED, PROCESSED, EXPORTED BY SELECTED
SOUTHERN HEMISPHERE PRODUCING COUNTRIES, SEASONS 1972-1977

(In thousands of metric tons)

Country	1972	1973	1974	1975	1976	1977
<u>PRODUCED</u> 1/						
Argentina	750	783	833	729	743	800
Australia	352	310	341	362	334	357
Brazil 2/	2,428	2,546	3,346	3,550	4,047	3,876
Chile	43	43	43	43	44	47
South Africa 3/.....	567	534	545	499	537	530
<u>PROCESSED</u> 1/ 4/						
Argentina	162	110	100	5/	5/	5/
Australia	163	113	167	172	157	181
Brazil 2/	1,400	1,428	1,999	2,162	2,652	2,652
Chile	2	2	2	2	2	2
South Africa	187	165	183	74	140	140
<u>EXPORTED</u> 6/						
Argentina	20	28	28	5	4/17	5/
Australia	30	21	10	15	5	4/8
Brazil 2/	67	41	40	73	36	4/31
Chile	0	0	0	0	0	0
South Africa	231	229	273	304	4/303	4/330

1/ Data are for season beginning with year shown. 2/ Sao Paulo State only.
3/ Production may include small quantity of tangerines. 4/ Attache estimate.
5/ Information not available. 6/ Data are for calendar year shown.

FRESH TANGERINES: PRODUCED, PROCESSED, EXPORTED BY SELECTED
SOUTHERN HEMISPHERE PRODUCING COUNTRIES, SEASONS 1972-1977

(In thousands of metric tons)

Country	1972	1973	1974	1975	1976	1977
<u>PRODUCED</u> 1/						
Argentina	226	249	230	230	229	227
Australia	24	28	26	27	30	26
Brazil 2/	332	326	437	516	636	588
<u>PROCESSED</u> 1/ 3/						
Argentina	13	9	9	4/	4/	4/
Australia	5/	5/	5/	1	1	1
Brazil 2/	4/	4/	4/	4/	4/	4/
<u>EXPORTED</u> 6/						
Argentina	2	5/	5/	5/	5/	4/
Australia	3/2	3/4	3/3	3/4	3/5	3/4
Brazil 2/	5/	5/	1	1	2	4/

1/ Data are for season beginning with year shown. 2/ Sao Paulo State only;
processing data is not available. 3/ Attache estimate. 4/ Information not
available. 5/ Less than 500 tons. 6/ Data are for calendar year shown.

FRESH LEMONS: PRODUCED, PROCESSED, EXPORTED BY SELECTED
SOUTHERN HEMISPHERE PRODUCING COUNTRIES, SEASONS 1972-1977

(In thousands of metric tons)

Country	1972	1973	1974	1975	1976	1977
<u>PRODUCED</u> 1/						
Argentina	186	232	306	339	247	297
Australia	32	34	35	35	39	35
Brazil 2/	193	196	294	375	384	379
Chile	42	40	39	42	44	48
South Africa	20	20	24	24	22	20
<u>PROCESSED</u> 1/ 3/						
Argentina	56	98	95	4/	4/	4/
Australia	20	23	28	20	21	20
Brazil 2/	4/	4/	4/	4/	4/	4/
Chile	1	1	1	1	1	1
South Africa	4	5	8	6	6	2
<u>EXPORTED</u> 5/						
Argentina	4	5	8	11	3/12	4/
Australia 3/	1	1	1	1	1	1
Brazil 2/	6/	6/	6/	6/	6/	4/
Chile	6/	6/	6/	3	5	4/
South Africa	11	10	12	14	3/13	3/14

1/ Data are for season beginning with year shown. 2/ Sao Paulo State only; includes both lemons and limes. 3/ Attache estimate. 4/ Information not available. 5/ Data are for calendar year shown. 6/ Less than 500 metric tons.

FRESH GRAPEFRUIT: PRODUCED, PROCESSED, EXPORTED BY SELECTED
SOUTHERN HEMISPHERE PRODUCING COUNTRIES, SEASONS 1972-1977

(In thousands of metric tons)

Country	1972	1973	1974	1975	1976	1977
<u>PRODUCED</u> 1/						
Argentina	140	179	177	185	180	160
Australia	16	17	18	20	21	22
Brazil 2/	5	5	6	3	2	2
South Africa	123	110	112	83	85	90
<u>PROCESSED</u> 1/ 3/						
Argentina	114	139	120	4/	4/	4/
Australia	6	12	10	11	12	14
Brazil 2/	4/	4/	4/	4/	4/	4/
South Africa	51	47	47	13	14	22
<u>EXPORTED</u> 5/						
Argentina	12	12	18	12	3/14	4/
Australia 3/	6/	6/	6/	6/	6/	6/
Brazil 2/	1	1	1	6/	1	4/
South Africa	66	61	61	62	3/66	3/61

1/ Data are for season beginning in year shown. 2/ Sao Paulo State only.
3/ Attache estimate. 4/ Data not available. 5/ Data are for calendar year shown. 6/ Less than 500 metric tons.

ORANGES, FRESH: EXPORTS FROM ARGENTINA, 1970-75
(Metric tons)

Country of destination	Calendar Year					
	1970	1971	1972	1973	1974	1975
<u>EUROPE</u>						
Belgium	---	2,783	754	---	171	---
France	---	338	7,104	8,400	9,117	422
Germany, West ...	---	1,128	360	2,680	1,692	243
Netherlands	72	4,495	3,029	11,778	9,085	3,602
Norway	---	---	---	---	148	---
Poland	---	57	---	---	---	---
Sweden	8	80	---	9	817	---
United Kingdom ...	---	2,473	6,104	1,787	4,179	---
Total	80	11,354	17,351	24,654	25,209	4,267
<u>OTHER COUNTRIES</u>						
Bolivia	---	44	---	---	---	---
Brazil	---	20	---	---	---	---
Chile	1,719	2,266	2,511	2,881	2,409	644
Dominican Rep. ...	5	---	---	---	---	---
New Zealand	---	---	---	759	---	---
Total	1,724	2,330	2,511	3,640	2,409	644
Grand total .:	1,804	13,684	19,862	28,294	27,618	4,911

ORANGES, FRESH: EXPORTS FROM AUSTRALIA, 1970-76
(Metric tons)

Country of destination	Calendar Year						
	1970	1971	1972	1973	1974	1975	1976
United States	47	---	---	---	---	---	89
<u>EUROPE</u>							
Belgium-Luxembourg..	510	156	44	278	66	---	---
Finland	23	---	---	---	75	---	---
France	154	712	534	547	40	36	---
Germany, Dem. Rep. :	---	---	---	48	---	---	---
Germany, West	---	69	207	262	34	---	38
Netherlands	819	3,575	1,181	581	309	78	---
Norway	139	187	173	333	30	127	75
Sweden	---	28	---	21	180	---	---
Switzerland	---	---	---	23	---	---	---
United Kingdom	977	2,042	2,555	1,944	435	226	---
Other	---	---	---	---	---	---	13
Total	2,622	6,769	4,694	4,037	1,169	467	126
<u>OTHER COUNTRIES</u>							
Canada	112	139	123	723	345	---	12
Christmas Island ...	36	28	23	29	24	41	50
Fiji Island	117	160	151	253	66	96	121
Hong Kong	1,148	639	1,353	21	300	54	---
Indonesia	7	110	329	380	225	362	194
Iran	---	---	---	40	---	---	---
Kuwait	---	---	---	300	---	---	---
Malaysia	653	584	997	397	334	503	143
Mauritius	98	131	117	56	18	30	21
Oman	30	7	15	15	---	---	---
Nauru Republic	49	21	51	36	27	30	50
New Caledonia	165	285	245	204	309	140	286
New Zealand	11,212	10,470	11,169	9,364	1,811	9,847	1,778
Papua-NG	141	299	281	269	211	164	225
Philippines	99	---	53	---	---	---	---
Saudi Arabia	---	---	92	---	---	---	---
Singapore	8,324	10,836	10,496	4,956	4,961	3,532	2,475
Southern Yemen	88	93	---	---	---	---	---
Trucial States	43	14	---	---	---	---	---
Other	28	33	33	28	18	14	25
Total	22,350	23,849	25,528	17,071	8,649	14,813	5,380
Grand total ...	25,019	30,618	30,222	21,108	9,818	15,280	5,595

ORANGES, FRESH: EXPORTS FROM BRAZIL, 1970-76
(Metric tons)

Country of destination	Calendar Year						
	1970	1971	1972	1973	1974	1975	1976
EUROPE							
Austria	---	888	---	---	79	144	---
Belgium-Luxembourg..	---	1,233	831	---	---	---	---
Czechoslovakia	---	---	3,012	1,804	---	3,996	8,531
Denmark	26	718	---	---	---	---	---
Finland	551	1,802	1,864	1,470	1,794	2,639	1,659
France	6,178	3,038	3,553	1,034	579	3	182
Germany, Dem. Rep. :	1,592	5,923	3,600	4,230	10,080	8,280	5,400
Germany, West	8,566	8,692	4,141	5,751	1	1,324	1
Hungary	---	35	91	---	105	---	---
Iceland	---	---	---	10	---	---	---
Ireland	1,750	1,413	---	---	---	---	---
Malta	---	---	---	---	---	779	---
Netherlands	7,041	18,664	30,274	16,809	19,396	33,910	19,949
Norway	26	1,033	298	116	252	228	---
Poland	---	---	385	425	540	---	---
Sweden	53	206	262	40	52	450	69
Switzerland	---	808	---	---	---	1	---
United Kingdom	8,127	16,826	16,600	8,244	3,583	5,662	438
Total	33,910	61,279	64,911	39,933	36,461	57,416	36,229
OTHER COUNTRIES							
Arab. Emirates	---	---	---	---	---	5,300	---
Barbados	---	---	---	---	25	---	---
Canada	1,059	2,398	1,330	630	---	---	---
Hong Kong	900	250	341	175	145	---	---
Iran	---	---	---	---	2,625	9,465	---
Malaysia	88	---	---	---	---	---	---
Netherland Antilles:	44	---	42	96	---	---	---
Senegal	686	184	---	---	263	890	175
Singapore	---	---	9	---	---	---	---
Total	2,777	2,832	1,722	901	3,058	15,655	175
Grand total ...	36,687	64,111	66,633	40,834	39,519	73,071	36,404

ORANGES, FRESH: EXPORTS FROM SOUTH AFRICA, 1970-75
(Metric tons)

Country of destination	Calendar Year					
	1970	1971	1972	1973	1974	1975
United States	210	---	---	---	---	---
<u>EUROPE</u>						
Austria	2,834	2,839	3,432	2,436	2,865	2,985
Belgium	13,051	12,404	14,068	14,771	16,527	12,542
Denmark	1,259	1,942	1,431	2,352	2,345	2,023
Finland	2,328	3,653	3,378	3,177	5,654	4,727
France	50,602	37,979	40,309	39,919	48,537	55,945
Germany, West	29,609	29,132	32,019	31,423	39,658	33,935
Iceland	303	385	431	362	263	530
Malta, Portugal, and Germany, Dem. Rep.	821	1,015	934	450	548	---
Netherlands	15,338	16,560	20,393	17,493	19,702	16,292
Norway	7,033	7,186	6,143	8,493	6,874	5,998
Poland	---	---	---	2,647	1,598	---
Sweden	6,927	8,181	6,961	6,194	6,718	6,403
Switzerland	1,295	2,204	2,033	2,696	3,210	2,913
United Kingdom and Ireland	72,117	74,249	71,043	69,065	78,739	78,639
Other Europe	---	---	---	---	---	2,415
Total	203,517	197,729	202,575	201,478	233,238	225,347
<u>OTHER COUNTRIES</u>						
Canada	10,202	10,685	9,635	10,386	8,763	9,847
Hong Kong	6,678	7,474	4,724	6,002	4,875	---
Japan	---	2,200	943	859	1,450	---
New Zealand	---	---	---	---	1,200	---
Singapore	4,084	4,718	---	---	---	---
Far East	---	---	---	---	---	10,179
Middle East	---	---	---	---	---	56,905
Other	8,195	8,475	13,120	10,188	23,593	1,752
Total	29,159	33,552	28,422	27,435	39,881	78,683
Grand total	232,886	231,281	230,997	228,913	273,119	304,030

TANGERINES, FRESH: EXPORTS FROM ARGENTINA, 1970-75
(Metric tons)

Country of destination	Calendar year					
	1970	1971	1972	1973	1974	1975
<u>EUROPE</u>						
Belgium	---	48	---	---	---	---
France	---	27	638	31	---	---
Germany, West	---	---	29	---	22	---
Netherlands	---	297	381	73	42	---
Norway	---	---	---	---	---	9
Sweden	---	---	---	---	6	158
United Kingdom	---	---	972	---	---	---
Total	---	372	2,020	104	70	167
<u>OTHER COUNTRIES</u>						
Bolivia	---	6	---	---	19	---
Chile	20	62	---	7	56	5
Total	20	68	---	7	75	5
Grand total	20	440	2,020	111	145	172

TANGERINES, FRESH: EXPORTS FROM BRAZIL, 1970-76
(Metric tons)

Country of destination	Calendar year						
	1970	1971	1972	1973	1974	1975	1976
Denmark	---	9	---	---	---	---	---
Finland	52	256	227	36	158	---	80
Germany, West	4	9	---	---	---	---	---
Netherlands	---	41	194	223	642	911	1,506
Norway	---	9	---	---	---	---	---
Sweden	70	9	44	---	26	---	95
United Kingdom	---	---	22	42	180	315	144
Grand total	126	333	487	301	1,006	1,226	1,825

LEMONS, FRESH: EXPORTS FROM ARGENTINA, 1970-75
(Metric tons)

Country of destination	Calendar year					
	1970	1971	1972	1973	1974	1975
<u>EUROPE</u>						
Belgium	---	---	---	1/	27	---
Finland	---	---	---	1/	162	254
France	---	205	2,109	1/	2,666	997
Germany, West	---	5	182	1/	173	612
Italy	---	38	---	1/	---	---
Netherlands	14	399	1,214	1/	1,700	1,771
Poland	---	---	---	1/	2,093	6,744
Sweden	25	---	---	1/	193	262
United Kingdom	---	---	290	1/	599	126
Total	39	647	3,795	1/	7,613	10,766
<u>OTHER COUNTRIES</u>						
Brazil	29	---	---	1/	---	---
Chile	---	21	25	1/	15	---
Total	29	21	25	1/	15	---
Grand total	68	668	3,820	1/5,462	7,628	10,766

1/ Country breakdown not available.

LEMONS AND LIMES, FRESH: EXPORTS FROM BRAZIL, 1970-76
(Metric tons)

Country of destination	Calendar year						
	1970	1971	1972	1973	1974	1975	1976
Belgium-Luxembourg ..	---	---	44	---	---	1	1
Denmark	---	2	1	---	---	---	---
Finland	---	---	1	---	---	---	---
France	---	---	17	45	79	105	128
Germany, West	1	49	63	13	17	80	31
Hungary	---	---	---	---	---	---	85
Netherlands	---	31	28	177	50	128	2
Sweden	1	8	5	---	---	13	9
Switzerland	---	---	---	---	---	4	4
United Kingdom	---	---	---	---	26	78	140
Grand total ..	2	90	159	235	172	409	400

LEMONS, FRESH: EXPORTS FROM SOUTH AFRICA, 1970-75
(Metric tons)

Country of destination	Calendar year					
	1970	1971	1972	1973	1974	1975
<u>EUROPE</u>						
Austria	262	385	910	1,485	1,573	1,792
Belgium	146	269	636	692	650	1,033
Denmark	102	103	484	461	361	303
Finland	225	292	225	158	525	607
France	575	1,197	2,241	1,153	1,863	2,227
Germany, West	11	69	290	194	386	261
Iceland	---	---	38	24	11	26
Netherlands	103	92	209	133	465	442
Norway	56	98	74	210	261	183
Sweden	147	128	312	232	313	454
Switzerland	---	36	104	66	120	---
United Kingdom and: Ireland	2,844	3,585	5,154	4,758	5,433	5,659
Total	4,471	6,254	10,677	9,566	11,961	12,987
<u>OTHER COUNTRIES</u>						
Canada	---	---	---	19	99	170
Japan	---	3	---	---	30	---
Far East	---	---	---	---	---	240
Middle East	---	---	---	---	---	472
Other	132	134	182	225	335	124
Total	132	137	182	244	464	1,006
Grand total	4,603	6,391	10,859	9,810	12,425	13,993

GRAPEFRUIT, FRESH: EXPORTS FROM ARGENTINA, 1970-75
(Metric tons)

Country of destination	Calendar year					
	1970	1971	1972	1973	1974	1975
<u>EUROPE</u>						
Belgium	---	---	180	---	40	---
Finland	---	---	---	---	17	---
France	---	1,771	7,054	5,522	7,444	2,518
Germany, West	---	336	1,176	1,660	2,423	1,844
Italy	---	205	---	---	---	---
Netherlands	20	410	1,140	2,553	5,181	6,420
Sweden	25	85	162	61	78	---
United Kingdom	---	1,041	2,202	1,870	3,027	802
Total	45	3,848	11,914	11,666	18,210	11,584
<u>OTHER COUNTRIES</u>						
Brazil	---	2	---	---	---	---
Chile	39	23	2	23	18	---
Total	39	25	2	23	18	---
Grand total	84	3,873	11,916	11,689	18,228	11,584

GRAPEFRUIT, FRESH: EXPORTS FROM BRAZIL, 1970-76
(Metric tons)

Country of destination	Calendar year						
	1970	1971	1972	1973	1974	1975	1976
Czechoslovakia	---	---	---	---	---	100	512
Denmark	75	---	---	---	---	---	---
Finland	6	---	---	---	83	---	---
Germany, West	280	322	---	---	240	---	340
Netherlands	357	413	900	150	225	42	---
Norway	---	2	---	---	---	2	---
Sweden	17	---	---	---	---	---	---
United Kingdom	458	338	510	375	337	331	---
Grand total	1,193	1,075	1,410	525	885	475	852

GRAPEFRUIT, FRESH: EXPORTS FROM SOUTH AFRICA, 1970-75
(Metric tons)

Country of destination	Calendar year					
	1970	1971	1972	1973	1974	1975
<u>EUROPE</u>						
Austria	420	628	713	870	1,044	1,248
Belgium	990	1,457	2,255	2,152	2,252	3,426
Denmark	526	557	488	506	422	493
Finland	502	684	633	765	1,095	13
France	11,454	10,369	10,377	9,444	7,560	9,728
Germany, West	9,726	9,278	10,441	11,744	13,808	15,491
Iceland	12	11	24	16	7	1,266
Italy, Malta, and						
Portugal	5,411	6,981	5,872	7,510	5,504	---
Netherlands	454	907	2,207	908	890	2,094
Norway	323	379	350	478	410	440
Sweden	992	1,003	1,211	1,278	1,079	1,066
Switzerland	855	1,125	1,583	1,702	1,642	1,450
United Kingdom and						
Ireland	23,098	29,781	26,762	22,536	21,370	16,400
Other Europe	---	---	---	---	---	6,584
Total	54,763	63,160	62,916	59,909	57,083	59,699
<u>OTHER COUNTRIES</u>						
Canada	795	986	2,768	1,160	1,318	540
Japan	---	262	461	116	2,194	---
Far East	---	---	---	---	---	1,620
Middle East	---	---	---	---	---	122
Singapore	---	139	---	---	---	---
Other	201	222	290	180	256	147
Total	996	1,609	3,519	1,456	3,768	2,429
Grand total	55,759	64,769	66,435	61,365	60,851	62,128

CITRUS JUICES:1/ EXPORTS FROM ARGENTINA, 1971-75
(Metric tons)

Commodity and country of destination	Calendar year				
	1971	1972	1973	1974	1975
<u>ORANGE JUICE</u>					
United States	684	559	---	---	---
<u>Europe</u>					
Belgium	175	129	---	33	---
France	108	64	222	127	32
Germany, West	2,063	2,208	1,706	2,068	803
Netherlands	1,765	1,748	763	126	---
Norway	---	---	46	33	---
Spain	---	100	---	---	---
Sweden	190	197	44	39	22
Switzerland	---	---	---	349	43
United Kingdom	298	119	1,472	385	675
Total	4,599	4,565	4,253	3,160	1,575
<u>Other Countries</u>					
Canada	377	---	---	---	---
Other	3	---	---	---	---
Total	380	---	---	---	---
Grand total	5,663	5,124	4,253	3,160	1,575
<u>TANGERINE JUICE</u>					
Germany, West	296	253	2/	3/	---
Netherlands	110	368	2/	3/	---
Spain	---	---	2/	3/	1
Grand total	406	621	2/135	3/	1
<u>GRAPEFRUIT JUICE</u>					
United States	313	---	2/	3/	27
<u>Europe</u>					
Belgium	204	236	2/	3/	97
France	225	238	2/	3/	123
Germany, West	1,341	1,764	2/	3/	544
Italy	67	33	2/	3/	---
Netherlands	676	1,216	2/	3/	278
Poland	---	---	2/	3/	124
Spain	27	54	2/	3/	11
United Kingdom	537	182	2/	3/	191
Total	3,077	3,723	2/	3/	1,368

Continued

CITRUS JUICES:1/ EXPORTS FROM ARGENTINA, 1971-75 (Continued)
(Metric tons)

Commodity and country of destination	Calendar year				
	1971	1972	1973	1974	1975
<u>GRAPEFRUIT JUICE (cont'd)</u>					
Other Countries					
Australia	200	24	<u>2/</u>	<u>3/</u>	---
Canada	1,438	592	<u>2/</u>	<u>3/</u>	---
Israel	616	1,004	<u>2/</u>	<u>3/</u>	---
Other	37	2	<u>2/</u>	<u>3/</u>	---
Total	2,291	1,622	<u>2/</u>	<u>3/</u>	---
Grand total	5,681	5,345	<u>2/</u> 4,507	<u>3/</u>	1,395
<u>LEMON JUICE</u>					
United States	2,771	566	<u>2/</u>	<u>3/</u>	---
Europe					
Belgium	1	---	<u>2/</u>	<u>3/</u>	257
France	---	---	<u>2/</u>	<u>3/</u>	24
Germany, West	74	25	<u>2/</u>	<u>3/</u>	632
Ireland	---	36	<u>2/</u>	<u>3/</u>	---
Netherlands	---	5	<u>2/</u>	<u>3/</u>	75
Spain	---	---	<u>2/</u>	<u>3/</u>	108
United Kingdom	145	267	<u>2/</u>	<u>3/</u>	323
Total	220	333	<u>2/</u>	<u>3/</u>	1,419
Other Countries					
Canada	54	49	<u>2/</u>	<u>3/</u>	26
Japan	---	---	<u>2/</u>	<u>3/</u>	105
Total	54	49	<u>2/</u> m	<u>3/</u>	131
Grand total	3,045	948	<u>2/</u> 3,972	<u>3/</u>	1,550

1/ Believed to be mostly concentrated juice. 2/ Country breakdown not available. 3/ Data not available.

ORANGE JUICE, CONCENTRATED: EXPORTS FROM BRAZIL, 1970-76
(Metric tons)

Country of destination	Calendar year						
	1970	1971	1972	1973	1974	1975	1976
United States	1,005	23,395	17,655	10,983	23,112	20,609	16,675
<u>EUROPE</u>							
Belgium-Luxembourg:	288	836	1,588	1,322	1,626	2,142	4,382
Denmark	190	693	708	834	530	1,079	4,282
Finland	10	105	405	1,086	929	3,050	6,090
France	---	538	615	696	240	200	240
German Dem. Rep. :	---	---	---	---	---	100	1,410
Germany, West	19,050	28,011	31,385	55,291	33,875	44,115	43,497
Netherlands	4,103	8,818	14,602	26,064	20,658	42,880	67,268
Norway	151	437	396	396	668	1,211	1,520
Poland	---	---	---	851	750	3,849	3,573
Portugal	---	---	---	1	---	2	---
Spain	152	100	470	450	326	4,307	2,493
Sweden	1,041	2,484	6,569	10,381	15,346	16,130	18,266
Switzerland	---	---	---	314	202	718	284
United Kingdom ...:	583	777	724	456	592	4,218	5,408
Yugoslavia	---	---	---	---	---	100	---
Total	25,568	42,799	57,462	98,142	75,742	124,101	158,713
<u>OTHER COUNTRIES</u>							
Australia	---	---	---	---	212	1,590	510
Canada	4,289	10,424	10,664	8,793	7,446	21,118	15,836
Israel	1,973	250	1,221	2,671	1,100	8,914	14,505
Japan	10	---	154	105	123	296	340
Mozambique	520	---	---	---	---	---	---
New Zealand	---	---	---	---	---	22	---
Paraguay	---	---	---	130	---	---	100
South Africa	100	465	---	160	---	---	---
Venezuela	---	---	---	---	725	4,247	3,162
Other	3	1	---	6	---	---	---
Total	6,895	11,140	12,039	11,865	9,606	36,187	34,453
Grand total:	33,468	77,334	87,156	120,990	108,460	180,897	209,841

CITRUS OILS: EXPORTS FROM ARGENTINA, 1971-75
(Metric tons)

Commodity	Calendar year				
	1971	1972	1973	1974	1975
Grapefruit	2	1	4	<u>1/</u>	---
Lemon	158	184	264	<u>1/</u>	173
Orange	36	5	3	<u>1/</u>	<u>2/</u>
Tangerine	1	5	6	<u>1/</u>	1

1/ Data not available. 2/ Less than one metric ton.

ORANGE OIL: EXPORTS FROM BRAZIL, 1970-75
(Metric tons)

Country of destination	Calendar year					
	1970	1971	1972	1973	1974	1975
United States	<u>1/</u>	147	282	183	244	253
<u>EUROPE</u>						
Belgium-Luxembourg:	<u>1/</u>	61	39	---	97	117
Denmark	<u>1/</u>	15	31	31	36	37
France	<u>1/</u>	309	455	192	566	226
Germany, West	<u>1/</u>	451	661	661	834	608
Italy	<u>1/</u>	---	---	---	11	10
Netherlands	<u>1/</u>	49	99	252	163	276
Spain	<u>1/</u>	9	22	35	36	233
Sweden	<u>1/</u>	4	5	7	4	10
Switzerland	<u>1/</u>	---	---	55	22	15
United Kingdom	<u>1/</u>	141	198	96	167	96
Other	<u>1/</u>	---	---	---	---	1
Total	<u>1/</u>	1,039	1,510	1,329	1,936	1,629
<u>LATIN AMERICA</u>						
Chile	<u>1/</u>	4	6	7	---	5
Panama	<u>1/</u>	---	---	10	---	---
Peru	<u>1/</u>	1	5	4	6	17
Other	<u>1/</u>	---	2	---	2	3
Total	<u>1/</u>	5	13	21	8	25
<u>OTHER COUNTRIES</u>						
Australia	<u>1/</u>	1	1	---	7	2
Canada	<u>1/</u>	13	17	24	13	76
Israel	<u>1/</u>	15	---	---	100	154
Japan	<u>1/</u>	25	35	85	120	4
Taiwan	<u>1/</u>	---	---	3	22	---
Other	<u>1/</u>	2	5	3	---	---
Total	<u>1/</u>	56	58	115	262	236
Grand total	<u>1/</u>	1,247	1,863	1,648	2,450	2,143

1/ Data not available.

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August 1977

ORANGE AND TANGERINE OUTPUT DOWN SLIGHTLY, GRAPEFRUIT AND LEMONS UP

Fewer oranges and tangerines are being produced in the 1976/77 season but more grapefruit and lemons, according to estimates for 21 countries that account for about 75 to 80 percent of the world citrus output. Total production of the four types of citrus in these countries is estimated at 36.9 million metric tons, the same as last season.

Larger production in North America was sufficient to offset lower output in the Mediterranean area, the Far East, and the Southern Hemisphere. Adverse weather in the largest producing country in each of these regions has combined to hold down this season's output.

Oranges and Tangerines

The orange crop is expected to be 30.5 million tons, one percent under last season's. Poor weather cut expected production sharply in the United States, Brazil, Japan, and Spain, the world's largest producers.

Despite a hard freeze in January, Florida produced a record orange crop and U.S. production reached a new peak, although juice yield was down. Mexico's production also was a record because of an absence of the winter freezes that have plagued growers in recent years. In Spain, the Mediterranean area's largest producer and exporter, hot dry weather early in the growing season coupled with alternating-year production cycles of some varieties led to this season's lower output.

In Japan, the tangerine (satsuma mandarin) crop suffered from lack of sufficient temperature and sunshine.

In the Southern Hemisphere, where harvesting is now in progress, early-season indications are that Brazil's (Sao Paulo) orange production will be slightly less than last season's. Heavy rains in Sao Paulo State during flowering and early stages of fruit set cut initial expectations substantially. South Africa expects an orange crop similar to last season's, while Argentina expects a better harvest.

Grapefruit

Production is expected to reach nearly 3.6 million tons in 1976/77, 3 percent more than last season. The United States, Israel, and Argentina account for about 92 percent of the total. The record-high level is mostly because of higher U.S. production, which was achieved despite the January freeze in Florida. The freeze reduced the size of Florida's record output, but Texas and California enjoyed good crops.

Mexico, an important North American producer, experienced a record harvest. (Cuba's production, of interest because the Government reports acreage expansion, was probably less than Mexico's.) In Israel, lower production was mainly attributed to a slight biennial variation. A smaller grapefruit crop is expected in Argentina according to an early season estimate. However, higher production could be achieved if farmers, in anticipation of good prices, applied larger quantities of fertilizers and insecticides.

Lemons

Production in 1976/77, is expected to be about 2.8 million tons, a rise of 8 percent, largely because of a substantial increase in California-Arizona. In the Mediterranean area output was down in the largest producing countries. Italy's smaller lemon crop is attributable to rains during May and June 1976, which caused flower and fruit drop and to a higher-than-usual incidence of mal secco. Lower production in Spain was caused by hot dry weather early in the season. A January 1976 frost caused smaller output in Greece. Southern Hemisphere production is expected to be up this season because of the increase in Argentina, believed to be the result of expanded plantings in recent years.

CITRUS FRUITS: PRODUCTION IN SPECIFIED COUNTRIES
SEASONS 1972 THROUGH 1976 1/

(1,000 Metric tons)					
Commodity and area	1972	1973	1974	1975	1976 ^{2/}
<u>ORANGES AND TANGERINES</u>					
North America:					
Belize	42	47	39	29	35
Jamaica	19	20	23	18	17
Mexico ^{3/}	1,270	1,089	1,110	905	1,283
Trinidad and Tobago	3	13	5	12	4
United States	9,371	9,074	9,913	10,172	10,308
Total	10,705	10,243	11,090	11,136	11,647
Mediterranean Area:					
Cyprus	204	173	157	97	47
Egypt	766	856	909	953	988
Greece	432	422	610	567	580
Israel	1,221	1,233	1,016	983	950
Italy	1,580	1,891	2,098	1,931	2,034
Morocco	988	819	583	725	710
Spain	2,816	2,659	2,479	2,643	2,364
Tunisia	90	92	100	116	101
Turkey	563	554	612	645	665
Total	8,660	8,699	8,564	8,660	8,439
Far East:					
Japan	4,070	3,864	3,952	4,234	3,651
Taiwan	266	309	337	321	340
Total	4,336	4,173	4,289	4,555	3,991
Northern Hemisphere Total	23,701	23,115	23,943	24,351	24,077
South America:					
Argentina	1,032	1,063	958	972	1,027
Brazil ^{4/}	2,872	3,782	4,065	4,608	4,468
Chile	43	43	43	44	47
Total	3,947	4,888	5,066	5,624	5,542
Other Southern Hemisphere:					
Australia	338	367	389	364	383
South Africa, Rep. of	534	545	499	537	530
Southern Hemisphere Total	4,819	5,800	5,954	6,525	6,455
Total specified countries	28,520	28,915	29,897	30,876	30,532

CITRUS FRUITS: PRODUCTION IN SPECIFIED COUNTRIES
SEASONS 1972 THROUGH 1976 1/ (cont'd)

(1,000 Metric tons)					
Commodity and area	1972	1973	1974	1975	1976 <u>2</u> /
<u>GRAPEFRUIT</u>					
North America:					
Belize	14	16	19	15	15
Jamaica	19	19	22	20	16
Mexico <u>3</u> /	32	34	36	32	50
Trinidad and Tobago	5	18	8	11	7
United States	2,428	2,442	2,271	2,585	2,724
Total	2,498	2,529	2,356	2,663	2,812
Mediterranean Area:					
Cyprus	75	68	58	50	52
Israel	384	388	403	445	420
Morocco	17	17	12	17	10
Spain	3	4	4	7	7
Total	479	477	477	519	489
Northern Hemisphere Total	2,977	3,006	2,833	3,182	3,301
South America:					
Argentina	179	177	185	180	160
Other Southern Hemisphere:					
Australia	17	18	20	21	22
South Africa, Rep. of	110	112	83	85	90
Southern Hemisphere Total	306	307	288	286	272
Total specified countries	3,283	3,313	3,121	3,468	3,573

CITRUS FRUITS: PRODUCTION IN SPECIFIED COUNTRIES
SEASONS 1972 THROUGH 1976 1/ (cont'd)

(1,000 Metric tons)

Commodity and area	1972	1973	1974	1975	1976 ² /
<u>LEMONS</u>					
North America:					
United States	766	613	1,014	614	879
Mediterranean Area:					
Cyprus	39	42	18	20	43
Greece	141	154	185	191	180
Israel	42	30	31	30	33
Italy	650	690	781	826	756
Morocco	8	3	7	3	7
Spain	196	265	225	254	210
Tunisia	9	15	15	18	22
Turkey	149	122	265	290	280
Total	1,234	1,321	1,527	1,632	1,531
Northern Hemisphere Total	2,000	1,934	2,541	2,246	2,410
South America:					
Argentina	232	306	339	247	297
Chile	40	39	42	44	48
Total	272	345	381	291	345
Other Southern Hemisphere:					
Australia	34	35	35	39	35
South Africa, Rep. of	20	24	24	22	20
Southern Hemisphere Total	326	404	440	352	400
Total specified countries	2,326	2,338	2,981	2,598	2,810

¹/ Data refer to harvests in the Northern Hemisphere beginning in the fall of the year shown and Southern Hemisphere harvests beginning in the spring of the following year.

²/ Preliminary.

³/ States of Nuevo Leon, San Luis Potosi, Tamaulipas, and Veracruz only.

⁴/ State of Sao Paulo only.

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fresh and processed citrus fruits

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HIGHER ORANGE AND LEMON PRODUCTION ESTIMATED FOR NORTHERN HEMISPHERE

Summary

Oranges. Northern Hemisphere production looks slightly larger than last season's record high, based on production estimates from 17 important commercial producing countries. Higher North American production and lower Mediterranean area production are forecast. The new record is likely despite the damaging freezes that hit Florida, Israel, Morocco, and Greece and a drought that trimmed Spain's production. In North America, Florida's fresh production was cut substantially by the January freeze (juice yields were also forecast lower) but nevertheless appears to be only slightly lower than the record high of a year earlier, while Texas and California-Arizona crops are forecast higher than last season's. Mexican production, recovering from several years of bad weather, was forecast to be 37 percent higher. In the Mediterranean area, Italy's greater output will only partially offset lower production elsewhere, but gains in Italy are mostly in blood oranges, which are not as favored in European export markets.

Tangerines. Sharply lower tangerine production is expected in Japan, where less sunshine was recorded, and the United States, where a January 1977 freeze sliced Florida output. Mediterranean production is expected to be higher, led by increases in Spain and Morocco.

Lemons. Early season estimates indicate an 8 percent rise in world production compared with last season's output, largely on the strength of a 49 percent gain in the United States. Total Mediterranean production is expected to be down about 8 percent with the reductions in early and winter varieties. Italy's summer lemon output, on the other hand, is expected to be about 5 percent larger.

Grapefruit. Little change is expected in 1976/77 production of grapefruit. Despite the Florida freeze, U.S. grapefruit production is expected to register in at last year's

record tonnage. Israel's crop is projected at 5 percent less than the record high of last season, when some of the crops could not find ready markets and had to be stored for later than normal exports or eventual processing.

Production By Country

Belize. Production of oranges (mainly for processing) is forecast at 35,000 tons, a significant increase over the 1975/76 levels. Grapefruit production is projected at 15,000 tons, about the same as last season's. Citrus area reportedly is unchanged.

The Mexican fruit fly continues to be a major problem. The Mediterranean fruit fly had not been detected in Belize as of early 1977 but an agreement to enable a joint field survey and trapping program between USDA's Animal and Plant Health Inspection Service and the Belize Ministry of Agriculture and Lands was expected to be signed in early 1977.

Cyprus. Production in the northern (Turkish) sector of the island continues to be plagued by a lack of citrus management skills. Reportedly only 57,000 tons, (30,000 tons of lemons, 10,000 tons of grapefruit, and 17,000 tons of oranges) were expected to be produced in the north during 1976/77, less than a third of production 3 years ago. Prior to the 1974 conflict this region produced about 90 percent of the island's lemons, and 70 percent of the oranges and grapefruit. The industry formerly was an important source of employment and earner of foreign exchange.

In the southern (Greek) sector, production has risen to 86,000 tons (30,000 tons of oranges, 43,000 tons of grapefruit, and 13,000 tons of lemons). Government irrigation projects underway or planned will provide water for an additional 5,000 hectares, most likely to be planted

to vegetables, citrus, and avocados. Also, a pipeline from the Yermasoyia dam has been extended to the Limassol area, a major citrus producing region, where several large estates reportedly have found grape production unprofitable and are planting to easy peel citrus and other crops.

Greece. According to a mid-season forecast, orange production in 1976/77 is estimated at 540,000 tons (about 70 percent navels)—slightly larger than last season's output, despite a January 1976 frost. Weather conditions have been favorable since then, and the quality of this season's crop has been described as good. Tangerine production in 1976/77 was expected to total a record 40,000 tons. Nearly two-thirds of production is reported to be the common Mediterranean mandarin.

Lemon production in 1976/77 is projected at 180,000 tons, down 6 percent from last season's total because of the January 1976 frost. Just over half of the production is the Maglino (Maglene) variety, which is harvested from September to January.

GREECE: NEW CITRUS PLANTINGS
(Thousands of trees)

Item	1973/74	1974/75	1975/76
Oranges	164	117	116
Lemons	161	139	177
Tangerines	52	31	3
Citrons	16	7	3
Bitter oranges	31	4	4
Grapefruit	43	21	10
Total	467	319	313

Although the Government continues to subsidize inputs (propagation material, fertilizer, etc.) under a program designed to increase productivity, marketing difficulties and limited availability of irrigated land have inhibited plantings, except for lemons. A new 5-year development plan is being prepared.

Producer prices for Washington navels for export in 1976/77 were forecast at 10.2 cents per kilogram, including an expected Government subsidy of 3.5 cents per kilogram. This compares with a producer price of about 8.6 cents (including a 4-cent subsidy) in 1975/76. The average 1976/77 producer price for lemons is expected to be about 19-20 cents kilogram.

Israel. Citrus production for the 1976/77 season was forecast at 1.4 million tons, about 4 percent less than in the previous season. The chief reason for the decline was a March frost that reduced Shamouti orange production to 570,000 tons, 9 percent less than a year earlier. Grapefruit production was also expected to slip to 420,000 tons (down 5 percent) because of a slight biennial variation. Valencia production, which escaped damage from the March frost, was forecast at 310,000 tons, nearly 8 percent higher than 1975/76. Although lemon production for 1976/77 was

forecast at 33,000 tons—about 2,500 tons more than a year earlier—area reportedly has been cut by as much as 30 percent since 1973.

Shamouti navel and valencia area also has dropped. The decline in Shamouti area is expected to continue for some years, although at a slower rate than recently. Grapefruit area, on the other hand, reportedly has risen by 55 percent since 1973, partly because lemon and Shamouti trees regrafted to grapefruit were correctly counted as grapefruit in the 1976 census.

Italy. Production from recent plantings, higher yields from young orchards, and favorable weather are expected to lift Italy's orange production to 1,720,000 tons, 9 percent above the 1975/76 level but still below the record crop of 1974/75. About 69 percent of Italy's orange crop will be produced in Sicily. As a result of the new plantings, nearly 71 percent of the total crop will be blood oranges—up from 66 percent 2 years ago. Output of the Tarocco blood orange variety may reach a record 505,000 tons, 27 percent more than in the previous year. Maturity of early orange varieties reportedly had been delayed this year by 2 weeks because of weather.

Specialized orange groves were reported in 1975/76 at 100,242 hectares, substantially the same as in 1974/75, with about 3 percent in nonbearing trees. Mixed orange groves totaled 18,386 hectares, down 4 percent.

During 1975/76 grower prices averaged 20 - 30 percent higher than in 1974/75, reportedly because of last season's lower production, inflation, devaluation of the Italian lira, and export subsidies and processing premiums established by the EC to strengthen the Italian lira. New-crop grower prices were reported to be higher in late November but volume was down, owing to late maturity. Farmer prices for both Moro and Tarocco varieties averaged 145 lire (about 16.8 cents) per kilogram in the last week of November 1976, compared with 99 lire (about 14.6 cents) for Moros and 126 lire (about 16.6 cents) per kilogram for Taroccos in November 1975.

Total 1976/77 tangerine (including clementine) production is forecast at 330,000 tons, 6 percent off from last season's level because of less favorable weather and the biennial production cycle. Clementine production was forecast at 90,000 tons, down about 1 percent. Area for 1975/76 was reported at 14,757 hectares of specialized mandarin production (including 1,330 hectares nonbearing) plus 5,908 specialized hectares for clementines (including 1,081 hectares nonbearing). Overall mandarin and clementine mixed area was reported at 14,829 hectares, with all but 3 percent in production.

The outlook for lemon production is 767,000 tons—7 percent less than in 1975/76—as a consequence of adverse weather, particularly rains during May and June that caused flower and fruit dropping. The Primofiore variety (available August-October) is expected to reach 151,000 tons, down nearly 9 percent, while winter lemons (October-May) are expected to total 446,000 tons, also down 9 percent. The summer Verdelli variety (May-August) may total about 5 percent higher at 123,000 tons, based on the

fruit set as of late November. Lemon area has remained constant in recent years. In 1975/76, specialized area was reported at 35,034 hectares and mixed lemon area at 10,562 hectares, about the same as last year. Specialized nonbearing area was placed at 2 percent of the total.

Grower prices averaged about 147 lire per kilogram in 1975/76, 5 percent more than in the previous season. Prices in late November were around 150-160 lire per kilogram (17.3 - 18.5 cents per kilogram), with stronger prices anticipated during the winter season.

Japan. Low temperatures and less sunshine were expected to result in a mandarin (mostly mikan) crop of 3.39 million tons, down 12 percent from the 1975/76 level. Navel orange production was forecast at 15,000 tons, while the summer orange crop (harvested from February to May) is unofficially estimated at 370,000 tons, up about 6 percent.

Mikan area was reported at 164,000 hectares in 1976, including 6,600 hectares nonbearing trees. Bearing area is down 3 percent from the 1974 level, while the total is down nearly 5 percent. Summer orange area was placed at 16,200 hectares in 1976, compared with 16,500 hectares in 1974.

In view of the smaller 1976/77 mikan harvest, the average Tokyo wholesale price was expected to be substantially higher this season than in the past two. For example, the average Tokyo wholesale price for mikans in the first 15 days of January 1977 was 154 yen (about 53 cents) per kilogram, compared with 87 yen (29 cents) during this period in 1976.

Mexico. Production of oranges, tangerines, and grapefruit, according to trade contacts in Mexico in early February 1977, is expected to total some 1.3 million tons in the four major producing States of Nuevo Leon, Tamaulipas, San Luis Potosi, and Veracruz. An estimated 90 percent of the country's total citrus crop is being produced in these States. Gains from the 1975/76 freeze-reduced crop were particularly noteworthy in Nuevo Leon, where orange production was estimated at 283,000 tons, nearly three times higher than in 1975/76, and tangerines were estimated at 85,000 tons, four times the 1975/76 level. In Veracruz, Mexico's largest citrus producing State, orange production was forecast at a record 630,000 tons, 20 percent above last season's total. Grapefruit production in the four States was estimated at a record 50,400 tons.

All citrus producing States experienced heavier-than-normal rain during the winter. Citrus trees were reported in excellent condition.

Morocco. Morocco's 1976/77 citrus production, mostly oranges and clementines (tangerines), is expected to be slightly lower than last season's. Orange output is forecast 8 percent less at 560,000 tons, while clementine production is projected at 150,000 tons, up 27 percent. The larger clementine harvest will somewhat offset the poor orange yields from frost-damaged areas. The quality of oranges and tangerines was said to be better than that of last season, when the crop had an excessive quantity of cull fruit. This season's orange sizes are expected to be larger, while clementine sizing will probably be smaller because of the heavy yield of the latter.

Morocco's citrus area has been estimated at 74,000 hectares but a census now underway may show this to be higher. Under Morocco's varietal replacement plan, 72,000 hectares will be planted exclusively to clementines, navels, and valencias by 1990. Preference will be given to the planting of early types, with a view to earlier exporting. No provisions have been made under this program to plant processing varieties. A reported 3,000 hectares were planted in the spring of 1976, while in the 1975/76 season about 2,400 hectares of seed-type varieties were uprooted.

Spain. In an early season forecast, the Spanish Ministry of Agriculture placed the 1976/77 citrus crop at 2,575,000 tons, 10 percent less than last season's and the smallest crop in 5 years. Orange and lemon outturns were hard hit by drought and high temperatures in May 1976. Lemon output was forecast at 217,000 tons, down 27 percent, but still the second largest on record. An off-year in the production cycle of a number of orange varieties was also expected to contribute to the smaller 1976/77 crop of 1,689,000 tons, down 12 percent from last season's total.

SPAIN: CITRUS AREA
(In hectares)

Fruit	1972	1973	1974
Oranges			
Navels	81,771	93,958	92,454
White, select	12,391	14,879	15,123
White, common . . .	6,045	7,164	7,128
Blood	11,973	12,066	11,878
Late varieties (verna and late valencia)	16,574	18,335	18,461
Total	128,754	146,402	145,044
Tangerines			
Satsumas	17,214	27,026	25,427
Clementines	20,938	25,276	24,731
Others (common, wilkins, etc.) . . .	2,501	2,527	2,451
Total	40,653	54,829	52,609
Lemons			
Verna	15,181	17,963	19,837
Mesero	2,720	3,450	3,783
Others	1,324	1,653	1,327
Total	19,225	23,066	24,947

Source: Spanish Government data.

Late-maturing verna oranges were forecast at 121,000 tons, up 1 percent, while valencias were projected at 87,000 tons, down 19 percent. Large numbers of new clementine and satsuma trees now coming into production were expected to boost tangerine production to 662,000 tons, up 5 percent.

Although timing and sizes of citrus were reported to be normal, August hailstorms and early December gales have lowered the quality of the fruit. The hailstorm hit scattered areas in the Provinces of Alicante, Valencia, and Murcia, leaving superficial scars on some of the early and midseason fruit and making them unfit for export. As a result of the gales, substantial quantities of early maturing tangerines and oranges, estimated at 4 to 6 percent of the total citrus crop, fell to the ground. This fruit was reported to have been salvaged for processing and domestic fresh consumption. Fruit remaining on the trees and struck by branches was reported to be exportable, but at lower prices.

Turkey. The 1976/77 citrus production forecast indicates a near-duplicate of last season. Oranges, mainly early varieties, were projected at 550,000 tons, compared with 540,000 tons in 1975/76, while tangerines were forecast at 115,000 tons, compared with 105,000 tons last season. Government estimates show that lemon production will be slightly lower in 1976/77 at 280,000 tons, while grapefruit production is expected to be slightly higher at 13,000 tons. According to Government officials, comprehensive surveys completed several years ago showed that lemon and grapefruit production, which is mostly in Mersin Province, was underestimated. As a result, official Turkish estimates for lemons and grapefruit have been about double since 1974/75.

Citrus tree numbers were placed at 15.9 million in 1975/76 (compared with 15.5 million in 1974/76), including 8.3 million orange trees, 4.0 million tangerine trees, 2.7 million lemon trees, 700,000 sour orange trees, and 200,000 grapefruit trees. Tree numbers are expected to

expand to nearly 16.3 million in 1976/77.

United States. According to the March 1, 1977, report by USDA's Crop Reporting Board the U.S. citrus crop will be the largest on record, despite the January 18-20 freeze in Florida that substantially reduced previous projections for the 1976/77 orange, tangerine, and grapefruit crops.

A record 9,582,000 ton crop is forecast for oranges. Larger crops in California, Arizona and Texas and only a slightly smaller crop in Florida account for the 1 percent increase in the U.S. estimate. Florida production, which is expected to be about 77 percent of the U.S. total, is mostly processed into juice. As a result of the freeze, Florida's average juice yield for the season is now forecast at 1.12 gallons of 45° Brix concentrate per 90-pound box, compared with the expected 1.29 gallons before the freeze and recorded in the 1976 season.

Florida's tangerine (including tangerines and tangerine hybrids) production was hard hit by the frost, with the result that U.S. production is forecast at only 562,000 tons, a 16 percent drop from the 1975/76 total.

Grapefruit production is forecast at 2,584,000 tons, about the same as in 1975/76. Florida's production (about 1,889,000 tons) is substantially lower than the previous projection for 1976/77 but only slightly lower than last season's output. The Texas crop (417,000 tons) is expected to be 7 percent larger than in 1975/76, while the California-Arizona crop is forecast 10 percent lower.

The California-Arizona lemon crop was forecast at 917,000 tons, 49 percent above the 1975/76 level but below the 1974/75 record. Picking was reported to be lagging behind last season's rate.

TABLE 1.--SWEET ORANGES: PRODUCTION IN SELECTED NORTHERN
HEMISPHERE COUNTRIES BY SEASON

(Thousands of metric tons)						
Country	1971/72	1972/73	1973/74	1974/75	1975/76	1976/77
Belize	39	42	47	39	29	35
Cyprus	154	204	173	157	97	47
Egypt <u>1/</u>	707	683	767	819	856	890
Gaza	135	160	165	155	165	165
Greece	362	518	393	576	533	540
Israel	1,148	1,221	1,233	1,016	983	950
Italy	1,457	1,316	1,557	1,763	1,580	1,720
Jamaica	16	17	17	18	14	14
Japan	288	366	322	386	366	385
Mexico	1,029	1,100	966	955	835	1,142
Morocco	669	737	629	477	607	560
Spain	1,808	2,077	1,923	1,854	1,930	1,689
Trinidad & Tobago ..	13	3	13	5	12	4
Tunisia	70	80	73	78	86	70
Turkey	460	467	470	500	540	550
United States	7,473	8,833	8,515	9,294	9,506	9,582
West Bank <u>2/</u>	40	49	49	49	46	46
Total	15,868	17,873	17,312	18,141	18,185	18,389

1/ Calendar year data beginning with calendar year 1972 through estimate for 1977.

2/ West Bank of Jordan River.

TABLE 2.--TANGERINES: PRODUCTION IN SELECTED NORTHERN
HEMISPHERE COUNTRIES BY SEASON

(Thousands of metric tons)						
Country	1971/72	1972/73	1973/74	1974/75	1975/76	1976/77
Egypt <u>1/</u>	101	83	89	90	97	98
Greece	28	32	29	34	34	40
Italy	304	264	334	334	351	330
Jamaica	5	2	3	5	4	3
Japan	2,609	3,704	3,542	3,567	3,869	3,390
Mexico	85	170	122	156	70	141
Morocco	151	251	190	106	118	150
Spain	372	565	537	572	628	662
Tunisia	5	10	19	22	31	31
Turkey	75	97	84	112	105	115
United States	564	538	559	619	666	562
Total	4,299	5,716	5,508	5,617	5,973	5,522

1/ Calendar year data beginning with 1972 through estimate for 1977.

TABLE 3.--LEMONS: PRODUCTION IN SELECTED NORTHERN
HEMISPHERE COUNTRIES BY SEASON

(Thousands of metric tons)						
Country	1971/72	1972/73	1973/74	1974/75	1975/76	1976/77
Cyprus	22	39	42	18	20	43
Egypt <u>1/</u>	3	3	3	3	2	2
Gaza	7	8	8	7	8	8
Greece	132	141	154	185	191	180
Israel	35	42	30	31	30	33
Italy	779	650	690	781	826	767
Morocco	8	8	3	7	7	7
Spain	96	199	206	161	296	217
Tunisia	9	9	15	15	18	22
Turkey <u>2/</u>	142	149	122	265	290	280
United States	575	766	613	1,014	614	917
West Bank <u>3/</u>	5	6	8	7	6	6
Total	1,813	2,020	1,894	2,494	2,308	2,482

1/ Calendar year data beginning with 1972 through estimate for 1977.

2/ Data collection method changed in 1974/75 causing sharp increase in official government estimates for lemons.

3/ West Bank of Jordan River.

TABLE 4.--GRAPEFRUIT: PRODUCTION IN SELECTED NORTHERN
HEMISPHERE COUNTRIES BY SEASON

(Thousands of metric tons)						
Country	1971/72	1972/73	1973/74	1974/75	1975/76	1976/77
Belize	15	14	16	19	15	15
Cyprus	60	75	68	58	50	52
Gaza	72	33	35	37	40	40
Israel	328	384	388	403	445	420
Jamaica	20	19	19	22	20	16
Mexico	20	32	34	36	32	50
Morocco	15	17	17	12	10	10
Spain	6	6	6	5	7	7
Trinidad & Tobago ..	19	5	18	8	11	7
Turkey <u>1/</u>	7	6	7	12	12	13
United States	2,380	2,428	2,442	2,271	2,585	2,584
Total	2,902	3,019	3,050	2,883	3,227	3,214

1/ Data collection method changed in 1974/75, causing sharp increase in official Government estimate for grapefruit.

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